

[Back](#) [Print](#)

# **Plan of Service and Budget Request for FY 2010 July 2009 Through June 2010**

## **Federation:**

South Central

## **Participating Federation Libraries:**

### **Public**

Big Horn County Public Library  
Bridger Public Library  
Carnegie Public Library  
Denton Public Library  
Dorothy Asbjornson Community Library  
Harlowton Public Library  
Joliet Public Library  
Judith Basin County Free Library  
Laurel Public Library  
Lewistown Public Library  
Moore Public Library  
Parmly Billings Library  
Petroleum County School-Community Library  
Red Lodge Carnegie Library  
Roundup School-Community Library  
Stillwater County Library

## Long Range Goals:

### Goal # Description

- |          |  |
|----------|--|
| <b>1</b> | Some Montana citizens have inadequate library services because of lack of local funding or capability. Sharing and collaborating for services helps everybody. |
|----------|--|

Associated MSL Goals:

- 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
- 

### Goal # Description

- |          |   |
|----------|---|
| <b>2</b> | Collaboration in the form of interlibrary loaning, partnering and automating help to make scarce resources available to all Montana citizens. Economic collaboration is allowed for libraries within the SOC Federation in the event of a disaster. |
|----------|---|

Associated MSL Goals:

- 1 - MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.
  - 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
  - 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.
  - 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
  - 5 - MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.
- 

### Goal # Description

- |          |   |
|----------|---|
| <b>3</b> | Public libraries in Montana need well-trained information specialists and knowledgeable trustees. |
|----------|---|

Associated MSL Goals:

- 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.
- 

### Goal # Description

- 4** Many Montana citizens do not know about the services offered by their community libraries. Libraries must efficiently and effectively manage and promote its programs and services.

Associated MSL Goals:

- 1 - MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.
  - 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
  - 5 - MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.
- 

**Goal # Description**

- 5** Libraries must provide information access and library services to all.

Associated MSL Goals:

- 1 - MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.
  - 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
  - 5 - MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.
- 

**Goal # Description**

- 6** Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries and library staff members do not have access to reliable and /or convenient technical support.

Associated MSL Goals:

- 1 - MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.
- 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
- 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.

- 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
  - 5 - MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.
- 

**Goal # Description**

- |          |   |
|----------|---|
| <b>7</b> | Many different types of libraries exist within Montana, they are all important in helping Montana citizens keep abreast of the times. |
|----------|---|

**Associated MSL Goals:**

- 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
  - 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
-

## Administrative Costs:

Several administrative functions are centralized at the State Library, but Federation members may want to authorize a stipend (of not more than \$1,000) to the federation coordinator or designated person who is willing to work with the State Library and Federation membership to plan meeting agendas, set up meetings, and do the appropriate plan of service and annual report preparation and filing.

### Revenue Summary:

	Allotted
CST Revenue	\$32,822.00
General Fund	<u>\$0.00</u>
Total:	\$32,822.00

### Expense Summary:

	Budgeted
Admin Costs	\$0.00
Stipend	\$0.00
Operating Costs	\$0.00
Supplies	\$0.00
Communications	\$0.00
Equipment	\$0.00
Mileage	\$0.00
Continuing Ed.	\$0.00
Program 1 - Continuing Education and Travel	\$2,730.00
Program 2 - Technology and Resource Sharing	\$21,911.52
Program 3 - \$2,000 will be allocated to fund continuing education and travel expenses for multi-type libraries.	\$2,000.00
Program 4 - \$2000 will be allocated for the purchase, maintenance, and mailing of Book Discussion kits.	\$2,000.00
Program 5 - Administrative Costs	<u>\$4,180.48</u>
Total:	\$32,822.00

## Program Summaries:

**Program: 1****Description:** Continuing Education and Travel**Narrative:**

This program supports all of the objectives. The objectives are to assist all Federation library workers and trustees to attend Federation meetings, pertinent conferences, meetings and other continuing education opportunities to meet patron needs. Many libraries within the Federation have very small budgets for attending meetings or conferences which help the library workers or trustees learn new skills, sharpen existing skills or develop mentorships. This program will allow all libraries in the Federation to be able to take advantage of some of these opportunities. This assistance may include paying for travel and meals to meetings or registrations for pertinent opportunities by the Federation participants.

A travel allowance for each of the public libraries to attend Federation meetings is an important part of this program. This program includes mileage and honorariums for presenters and supplies needed for the Federation meetings. This program also includes travel compensation for the Federation Coordinator to attend various meetings deemed to be in the Federation's best interest, such as Library Commission meetings, Library Legislative Day, Federation Coordinators' meetings, Federation meetings, etc.

**Evaluation:**

Member libraries will put the training to use in their library and share what they learned at Federation meetings.

The Coordinator will keep receipts or expense reports for travel and meeting related expenses, according to the Library procedures at the host's library.

#### **Associated South Central Federation Goals:**

1 - Some Montana citizens have inadequate library services because of lack of local funding or capability. Sharing and collaborating for services helps everybody.

2 - Collaboration in the form of interlibrary loaning, partnering and automating help to make scarce resources available to all Montana citizens. Economic collaboration is allowed for libraries within the SOC Federation in the event of a disaster.

3 - Public libraries in Montana need well-trained information specialists and knowledgeable trustees.

4 - Many Montana citizens do not know about the services offered by their community libraries. Libraries must efficiently and effectively manage and promote its programs and services.

5 - Libraries must provide information access and library services to all.

6 - Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries and library staff members do not have access to reliable and /or convenient technical support.

7 - Many different types of libraries exist within Montana, they are all important in helping Montana citizens keep abreast of the times.

**Program** \$2,730.00

#### **Budget:**

**Budget Library**

**Amount**

**Detail:**

Big Horn County Public Library	\$179.00
Bridger Public Library	\$142.00
Denton Public Library	\$312.00
Dorothy Asbjornson Community Library	\$312.00
Harlowton Public Library	\$138.00
Joliet Public Library	\$120.00
Judith Basin County Free Library	\$243.00
Laurel Public Library	\$85.00
Lewistown Public Library	\$231.00
Moore Public Library	\$224.00
Parmly Billings Library	\$84.00
Petroleum County School-Community Library	\$257.00
Red Lodge Carnegie Library	\$151.00
Roundup School-Community Library	\$166.00
Stillwater County Library	<u>\$86.00</u>

Total expenses for Program 1: \$2,730.00

Variance from Program 1 budget: \$0.00

**Program: 2**

**Description:** Technology and Resource Sharing

**Narrative:**



This program supports most of the SOC objectives. Monies here will be used for technology and resource sharing related expenses of member public libraries. Emphasis is on technology that strengthens federation-wide public access, resource sharing and document delivery. Monies can be expended for such things as computer hardware, software, telephone/internet connectivity, shared catalog expenses as well as OCLC costs, marketing libraries, and online database expenses.

Any remaining money at the end of the fiscal year will be divided by the following criteria: the four lowest expenditures per capita based on the State Statistical Report of the previous year are to be given a four way split of the remaining unspent monies. The following year the funds will be split between the next four lowest expenditure libraries. A library can't be chosen two years in a row. In the event of a disaster which diminishes the service of a library within the SOC, the Federation can vote to allocate some or all of the remaining funds to the rehabilitation of the diminished library.

#### **Evaluation:**

Each library will produce an online expense report of the purchases made and how the equipment/product benefited the Federation by July 30 for the previous fiscal year. Individual library reports will be added together to create an annual Federation report for the Montana State Library.

#### **Associated South Central Federation Goals:**

1 - Some Montana citizens have inadequate library services because of lack of local funding or capability. Sharing and collaborating for services helps everybody.

2 - Collaboration in the form of interlibrary loaning, partnering and automating help to

make scarce resources available to all Montana citizens. Economic collaboration is allowed for libraries within the SOC Federation in the event of a disaster.

3 - Public libraries in Montana need well-trained information specialists and knowledgeable trustees.

4 - Many Montana citizens do not know about the services offered by their community libraries. Libraries must efficiently and effectively manage and promote its programs and services.

5 - Libraries must provide information access and library services to all.

6 - Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries and library staff members do not have access to reliable and /or convenient technical support.

7 - Many different types of libraries exist within Montana, they are all important in helping Montana citizens keep abreast of the times.

**Program**     \$21,911.52

**Budget:**

<b>Budget Library Detail:</b>	<b>Amount</b>
Big Horn County Public Library	\$1,369.47
Bridger Public Library	\$1,369.47
Carnegie Public Library	\$1,369.47
Denton Public Library	\$1,369.47
Dorothy Asbjornson Community Library	\$1,369.47
Harlowton Public Library	\$1,369.47
Joliet Public Library	\$1,369.47
Judith Basin County Free Library	\$1,369.47
Laurel Public Library	\$1,369.47
Lewistown Public Library	\$1,369.47

Moore Public Library	\$1,369.47
Parmly Billings Library	\$1,369.47
Petroleum County School-Community Library	\$1,369.47
Red Lodge Carnegie Library	\$1,369.47
Roundup School- Community Library	\$1,369.47
Stillwater County Library	<u>\$1,369.47</u>
Total expenses for Program 2: \$21,911.52	
Variance from Program 2 budget:	\$0.00

**Program: 3**

**Description:** \$2,000 will be allocated to fund continuing education and travel expenses for multi-type libraries.

**Narrative:**

This program provides the opportunity for the multi-type libraries of the Federation to progress towards fulfillment of Objective 3 and 7 specifically, by providing them with the opportunity to apply for assistance with training and/or mileage to training. The availability of this funding will be announced by an annual mailing sent out by the Federation Coordinator. Grants will be as much as \$250 based on an itemized expense request and includes a copy of the training agenda. Grants will be honored on a first come basis, one grant per library per year for any multi-type library in the Federation. The public libraries are not eligible for these particular grants.

**Evaluation:**

Member librarians will put the training to use in their libraries and share what they learned at Federation meetings.

**Associated South Central Federation Goals:**

3 - Public libraries in Montana need well-trained information specialists and knowledgeable trustees.

7 - Many different types of libraries exist within

Montana, they are all important in helping Montana citizens keep abreast of the times.

**Program** \$2,000.00

**Budget:**

<b>Budget Library Detail:</b>	<b>Amount</b>
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Carnegie Public Library	<u>\$2,000.00</u>
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Total expenses for Program 3: \$2,000.00

Variance from Program 3 budget: \$0.00

**Program: 4**

**Description:** \$2000 will be allocated for the purchase, maintenance, and mailing of Book Discussion kits.

**Narrative:**

The Federation will provide Book Discussion Kits to member libraries in support of Objectives 1 and 2. These kits will be rotated within the Federation to encourage Federation libraries to support reading groups for their patrons. Based on the model presented by the Parmly Billings Library, cordura-nylon bags will be purchased and filled with 8 copies of the same title, along with discussion questions for book discussion groups. These kits will be cataloged in the Federation Coordinator's library and mailed to Federation members from there. Return postage will be included.

**Evaluation:**

Statistics for the Book Discussion Kits will be presented in the Annual Report.

**Associated South Central Federation Goals:**

1 - Some Montana citizens have inadequate library services because of lack of local funding or capability. Sharing and collaborating for services helps everybody.

2 - Collaboration in the form of interlibrary loaning, partnering and automating help to make scarce resources available to all Montana citizens. Economic collaboration is allowed for libraries within the SOC Federation in the event of a disaster.

**Program**            \$2,000.00  
**Budget:**

<b>Budget Library</b>	<b>Amount</b>
<b>Detail:</b>	

Carnegie Public Library	<u>\$2,000.00</u>
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Total expenses for Program 4: \$2,000.00

Variance from Program 4 budget:        \$0.00

**Program: 5**

**Description:** Administrative Costs

**Narrative:**

A stipend of \$2,000 will be paid to Kate Lewis as recognition of the efforts as the Federation Coordinator as she works with the State Library and Federation Members to prepare a plan of service, an annual report, attends Library Commission meetings and sets up federation meetings and projects. \$150 will be paid to the City of Big Timber to cover administrative costs. \$200 will be paid to Big Timber Public Library for expenses of printing, photocopying etc. \$1380.00 is allotted for the Federation Coordinator for travel and per diem. \$450.48 is set aside for Federation Meeting meals, trainings and expenses.

**Evaluation:**

Federation Coordinator will prepare Plan of Service, Annual Report, attend necessary Commission meetings, set up federation meetings and projects.

**Associated South Central Federation Goals:**

1 - Some Montana citizens have inadequate library services because of lack of local funding or capability. Sharing and collaborating for services helps everybody.

2 - Collaboration in the form of interlibrary loaning, partnering and automating help to make scarce resources available to all Montana citizens. Economic collaboration is allowed for libraries within the SOC Federation in the event

of a disaster.

3 - Public libraries in Montana need well-trained information specialists and knowledgeable trustees.

4 - Many Montana citizens do not know about the services offered by their community libraries. Libraries must efficiently and effectively manage and promote its programs and services.

5 - Libraries must provide information access and library services to all.

6 - Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries and library staff members do not have access to reliable and /or convenient technical support.

7 - Many different types of libraries exist within Montana, they are all important in helping Montana citizens keep abreast of the times.

**Program**            \$4,180.48

**Budget:**

<b>Budget Library</b>	<b>Amount</b>
<b>Detail:</b>	

Carnegie Public Library	<u>\$4,180.48</u>
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Total expenses for Program 5: \$4,180.48

Variance from Program 5 budget:        \$0.00

## Signatures/Approvals:

**Membership Approval Date:** \_\_\_\_\_

**Federation Coordinator:**

\_\_\_\_\_  
Kate Lewis - Library Director

\_\_\_\_\_  
Date

**Federation Advisory Board Chairperson:**

\_\_\_\_\_  
Kathy Agnew - Library Board Chair

\_\_\_\_\_  
Date

**Chairperson, Board of Trustees, Federation Coordinator's Library:**

\_\_\_\_\_  
Kathy Agnew - Library Board Chair

\_\_\_\_\_  
Date

## Check Summary/Totals:

<b>Library</b>	<b>Check Amount</b>
Big Horn County Public Library	\$1,548.47
Bridger Public Library	\$1,511.47
Carnegie Public Library	\$9,549.95
Denton Public Library	\$1,681.47
Dorothy Asbjornson Community Library	\$1,681.47
Harlowton Public Library	\$1,507.47
Joliet Public Library	\$1,489.47
Judith Basin County Free Library	\$1,612.47
Laurel Public Library	\$1,454.47
Lewistown Public Library	\$1,600.47
Moore Public Library	\$1,593.47
Parmly Billings Library	\$1,453.47
Petroleum County School-Community Library	\$1,626.47
Red Lodge Carnegie Library	\$1,520.47
Roundup School-Community Library	\$1,535.47
Stillwater County Library	<u>\$1,455.47</u>

Total Allocated: \$32,822.00

Total Budgeted: \$32,822.00

Discrepancy: \$0.00